File Naming Convention

- **Format**
  - ***[Subject], [Owner] to [Recipient] [(Document-type)] [Delivery-date]***

- **Example**
  - Knowledge Management Initiative Status, Walk R. to Nelson J. (Presentation) 2004-05-10

PM3006514037

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

File Naming Convention

➢ Guidelines

- ***Subject*** is a brief title or description of the subject-matter of the document
- ***Owner*** is the person who is responsible for defining the information in the document
  - usually, the document owner is the same as the author, however, in some situations, the document owner designates another author or team of authors to create the document
- ***Recipient*** is the name of the person(s), group, or organization who received the document or the event at which the document was presented
- Recommended ***Owner/Recipient*** name format
  - Use *[**Last-name first-initial.**]* for all names
  - If two ***Owners/Recipients***, use the format ***[First-owner/recipient-last-name first-name-initial.] and [Second-owner/recipient-last-name first-name-initial.]***
  - If three or more ***Owners/Recipients***, use the format ***[First-owner/recipient-last-name first-name-initial.] et al.***

PM3006514038

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

File Naming Convention (continued)

- **Guidelines** (*continued*)
  - If ***Recipient*** is not a specific person but rather a group, organization, or event, use a brief name or description of that group, organization, or event
  - ***Document-type*** can be one of the following: *Consensus*, *Correspondence*, *Poster*, *Presentation*, *Publication*, *Report*, *Submission*, *Guideline*, *Other*
  - ***Delivery-date*** is the date the document was actually delivered
    - Based on user feedback, document delivery date was rated important
    - It is not easy to see document delivery date otherwise
    - Recommended format: ***yyyy-mm-dd***

PM30065140 39

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

Rationale for EDMS Folders

- Virtual Folders (based on Tabs)
  - Should not change access permissions (e.g., RD&E-wide, restricted to departments, restricted to workgroups, restricted to personal)
  - Document characteristics
  - Planning and People ?
- "Hard" Folders
  - Key RD&E initiatives with long term applicability (e.g., 5 years)
  - Additional topics of high interest to RD&E based on input from RD&E management and users

PM3006514040

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

Guidelines for EDMS Tabs (Attributes)

- Attributes should facilitate efficient* retrieval of relevant documents.
- Attributes should be selected based on documented rationale agreed upon by users.
- Attributes should not require modification/update
- All proposed attributes should be reviewed by a focus group and submitted to the RD&E Knowledge Management Initiative team for approval prior to adoption in RD&E EDMS.
- The number of attributes should be as small as possible to prevent causing system inefficiency and overburdening the users during document storage.

* = Fast, intuitive and complete

PM3006514041

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

EDMS Attributes and Hard Folders

Attributes

- **Document Type*+**
  - Consensus document
  - Correspondence
  - Poster
  - Presentation
  - Publication
  - Report
  - Submission
  - Guideline
  - Other
- **Document Status***
  - Draft
  - Final
- **Document Sharing***
  - RD&E wide
  - Departments
  - Workgroups
  - Personal

Hard Folders (examples)

- **Guidance *+**
  - Ammonia
  - Carbon
  - Determinants of exposure
  - Environmental Tobacco Smoke (ETS)
  - External Research Program
  - Harm reduction
  - Human exposure
  - Ingredients
  - Low tar
  - Menthol
  - Assays
  - Rapid screening
  - Sensory
  - Smoke constituents
  - N/A
- **Evaluation *+**
  - Electrically Heated Cigarette (EHCSS)
  - Risk assessment
  - Product Evaluation Science Advisory Board
  - Smoke Constituent Reduction (SCoR)
  - Smoking cessation
  - Smoking conditions
  - Surveillance
  - Total Exposure Study (TES)
  - N/A
- **Smoking and Health *+**
  - Addiction
  - Cancer
  - Cardiovascular effects
  - Reproductive effects
  - Respiratory effects
  - Other health endpoints
  - N/A
- **Planning ?**
  - Project/Publication sheets
  - Planning meeting information
  - Contract related information
  - N/A
- **People ?**
  - Bi-weekly calendars
  - Organizational information
  - N/A

* = Mandatory
\+ = Multiple attributes allowed

PM3006514042

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

What Is Needed?

- Agreement on the direction for RD&E
- Definition of accountability
- Cross-functional core team
- Budget

PM3006514043

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001

Role Statements

EDMS Technology Coordinator	**Provide consulting in the selection of appropriate technologies and interface with IS in the implementation of business solutions.**	
EDMS Design Coordinator	**Establish the design, structure and organization of the RD&E EDMS site.**	
Policy and Guidelines Coordinator	**Define content and user policies and guidelines for the RD&E EDMS site.**	
Initiative Content Coordinator	**Initiate and support the capture of relevant and accurate content in RD&E (R&T) EDMS.**	
Training Coordinator	**Develop and deliver needed EDMS training to the RD&E user community.**	
Performance Evaluation Coordinator	**Develop and evaluate measures of success for the WSA EDMS site, e.g., system and usage performance metrics.**	
Maintenance and Support Coordinator	**Establish capability for on-going maintenance, support, and continuous improvement for the RD&E EDMS site.**	

PM3006514044

Source: https://www.industrydocuments.ucsf.edu/docs/lsgj0001